



TO: Florida Department of Transportation
FROM: The Schapiro Group, Inc.
DATE: August 19, 2014
RE: Customer Satisfaction Tracking Study — District 3 Results

The Schapiro Group (TSG) interviewed 300 Florida freeway drivers across District 3 as part of a larger statewide survey effort to explore ongoing usage of, attitudes toward, and perceptions of the Florida Department of Transportation's (FDOT) Intelligent Transportation Systems (ITS) services. Data collected in 2006, 2008, 2010, and 2012, in addition to the 2014 results, allow for changes in usage and attitudes to be tracked over time. During the months of April-June 2014, TSG randomly sampled phone numbers within Escambia and Leon Counties to obtain scientific telephone survey data. The margin of sampling error for results is $\pm 5.7\%$. This report summarizes key changes in attitudes and behaviors regarding ITS services over the past eight years.

Some research highlights from District 3 include:

Driving Patterns and Traffic Information Services

- The number of drivers on District 3 freeways during all day parts has remained largely the same since 2010.
- Drivers are using radio (44%) and television (32%) as sources for traffic information in virtually the same rates as they did in 2012. Of the drivers who use these sources, approximately half continue to see them as “very useful” in aiding their trips.
- Drivers use several different sources for their traffic information, but their usage patterns have changed since 2012. In-car navigation systems (44% in 2014; 26% in 2012) and electronic message signs (43% in 2014; 70% in 2012) are the most popular, with another 33% using websites on their computer or cell phone (this description changed from “home or work computers,” which was cited by 25% in 2012). One-fifth use mobile apps, while all other tested sources are used by less than 20% of drivers.
- Among drivers who use websites for traffic information, their patterns also changed. Use of Google maps (41%) has doubled since 2012, while local TV and radio station websites dropped to 11% (27% in 2012). Just over one-third of drivers continue to indicate some other site or they do not know.
- Starting in 2014, we asked drivers who use mobile apps for traffic information about their main mobile app for this kind of information. Google maps (31%) is the leader by far, with 47% either not knowing or indicating some other site.

ITS Services: 511 Traveler Information System

- When asked if they would use a service that provided traffic information through a phone call, website, mobile app, or social media site, roughly half of drivers continue to say that they would be likely to use it.
- Awareness of the 511 Traveler Information System continues to have increased since 2010 and is now at 32%. Among those who have some knowledge of the system, the proportion of drivers who use it (27%) has remained about the same since 2010. District 3 drivers are most likely to find out about 511 through signs on the freeway, friends or acquaintances, or the radio.
- Starting in 2012, respondents who use the 511 Traveler Information System are now asked which services they use. The most popular, by far, remains the call-in service (41%), with usage at the same level as in 2012. Use of the website more than doubled to 36%, while the mobile app held steady at just under 20%. Personalized service is up to 14%, while no other service is used by more than 10% of 511 Traveler Information System users.
- Drivers use the 511 Traveler Information System in a variety of situations, and those patterns also changed. They are most likely to use it while stopped in traffic approaching congestion (61% in 2014; 22% in 2012) or during an emergency (46% in 2014; 20% in 2012). Usage on their way to their destination dropped from 43% to 27%, and a similar decline was seen in usage before they leave for their destination (23% in 2014; 38% in 2012).
- Most drivers (77%) continue to change their route based on the information they received from the 511 Traveler Information System. Some have changed their departure time (41%), their stress level (40%), or their estimated time of arrival (31%). All of these behavior changes have increased since 2012.

ITS Services: Electronic Message Signs

- Three-quarters of District 3 drivers read electronic message signs at least once per week, a decrease from 90% in 2012. In levels similar to 2012, most users believe the signs are accurate (96%), easy to read (95%), and useful (87%), and 77% are likely to change their route based on information they see posted.

ITS Services: Road Rangers

- Awareness of the Road Rangers has been consistently low in District 3 compared to the rest of the state. While 62% of drivers statewide know about this service, only 27% of drivers in District 3 are aware of it. As was true in 2012, roughly 15% of drivers who are aware of Road Rangers have top-of-mind awareness on how to contact them. When prompted with a reminder about *FHP/*347, 64% of other drivers say they know to call that number to request assistance (up from 43% in 2012). Among drivers who say they do not know how to contact a Road Ranger, 65% say they have heard of *FHP (also up from 47% in 2012).

- The number of District 3 drivers who have been assisted by a Road Ranger has remained low since 2010. As has been true in the past, virtually every respondent who has been assisted (91%) said that the Road Ranger was “very helpful.” Most drivers (86%) who know about Road Rangers, even those who have not had direct experience with them, continue to believe this service to be at least “somewhat useful.”
- When asked what types of additional information they would like FDOT to provide, almost three-quarters of drivers (72%) said they would like information about alternate routes to help them avoid traffic incidents. Just under one-tenth (7%) of District 3 drivers said they would like this service to provide *all* types of information, including information about roads outside their area, other transportation services, local attractions, and automotive services. This represents a drop from 28% in 2012.